

# Back Up A Small Business Without Cloud Lock-In — Checklist

*Print and tick off. Setup ~3 hours; quarterly cadence ~30 min.*

**Date completed:** \_\_\_\_\_

Re-run this quarterly. Each pass takes about 12 minutes.

## Beginner — do these in order

- 1. Inventory of systems to back up**  
Files, email, accounting, CRM, code
- 2. NAS purchased and running RAID**  
Synology or QNAP, 4 drives
- 3. Daily backups pulling to NAS**  
Active Backup or HBS
- 4. Encrypted cloud backup running**  
Backblaze B2 / Wasabi with Object Lock
- 5. Air-gap copy in place**  
USB rotated or immutable storage
- 6. SaaS backup running for M365/GWS**  
Spanning or Synology M365 backup
- 7. Recovery runbook written and stored offline**  
Printed + password manager + safe
- 8. Quarterly restore test scheduled**  
Calendar invite, runs forever

## Advanced — if you want to go further

- Second cloud provider for diversification
- Veeam Backup & Replication
- Bare-metal recovery images
- WORM compliance for regulated data
- KMS for backup keys
- Document escrow with attorney